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SOFTWARE

Basic System Administration & Reports Training Guide

Compiled April 2009

Evergreen Basic System Admin Guide

This guide brings together documentation from several current Evergreen customers, including Evergreen Indiana and SITKA. All documentation can be accessed @ http://evergreen-ils.org/dokuwiki/doku.php?id=community_tutorials

Table of Contents

Local System Administration

This tip sheet will illustrate the options available in the Local System Administration interface. You need to be logged in as a Local System Admin to change the Closed Dates Editor, Library Settings Editor and access the Reports interface.

A staff person with lower permission level than a Local System Admin, like a circulator or circ/cat, can make changes to the Global Font and Sound Settings, Printer Settings Editor, Copy Locations Editor, Non Catalogued Types Editor, Statistical Category Editor, run Cash Reports, and run a Transit List.
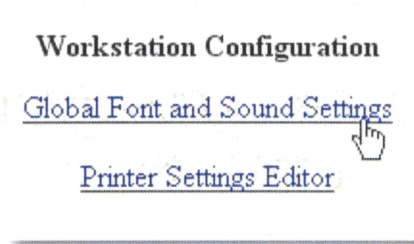
To access *Local System Administration* click *Admin (-)* at top right of screen then select *Local System Administration.*
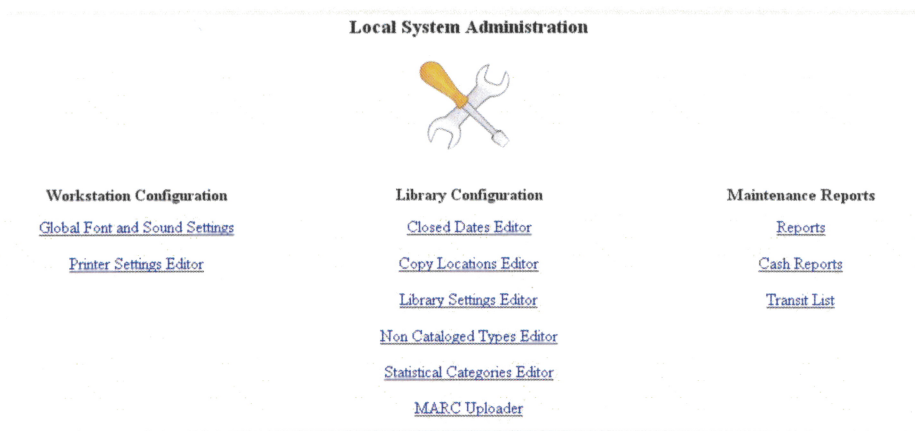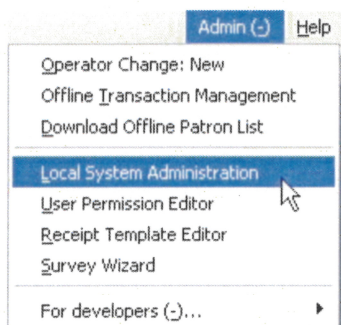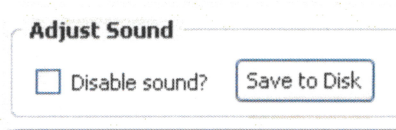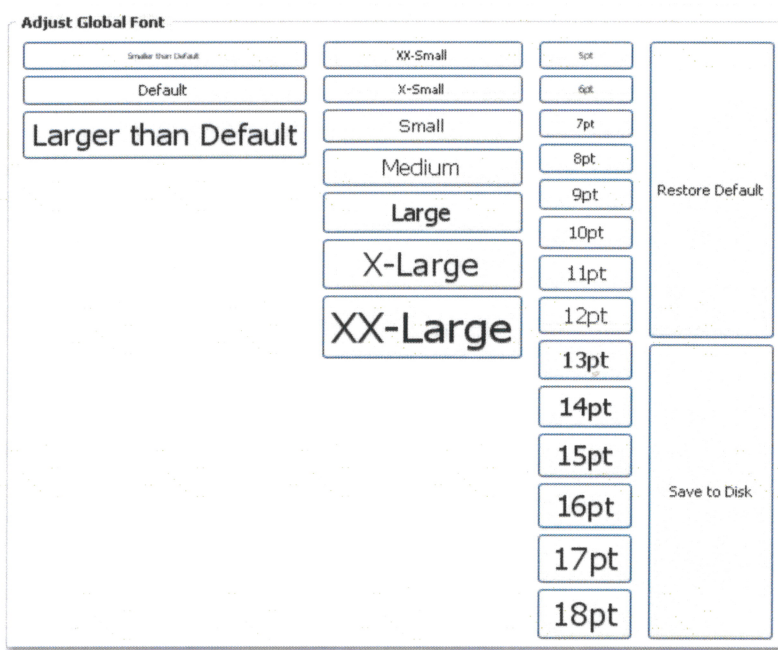
Global Font and Sound Settings

1. *Select Global Font and Sound Settings* under *Workstation Configuration.*

Workstation Configuration

Global Font and Sound Settings

Printer Settings Editor

2. To turn off the system sounds, like the noise that happens when a patron with a block is retrieved check the disable sounds box and click *Save to Disk*.

Adjust Sound

☐ Disable sound?   Save to Disk

3. To change the size of the font, pick the desired option and click *Save to Disk*.

Adjust Global Font

Smaller than Default	XX-Small	5pt	
Default	X-Small	6pt	
Larger than Default	Small	7pt	
	Medium	8pt	Restore Default
	Large	9pt	
	X-Large	10pt	
	XX-Large	11pt	
		12pt	
		13pt	
		14pt	
		15pt	
		16pt	Save to Disk
		17pt	
		18pt	

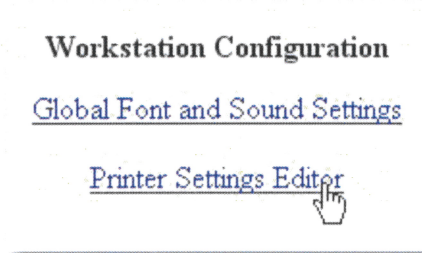**NOTE**
Changing the font size changes the size of the font for the buttons, but not everything on the screen.

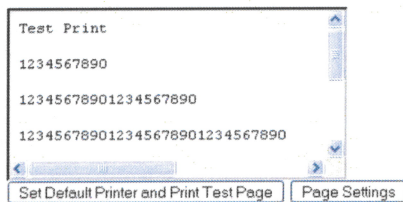1. Select *Printer Settings Editor* under *Workstation Configuration*.

> ### Workstation Configuration
>
> Global Font and Sound Settings
>
> Printer Settings Editor

2. From this screen you can print a test page, or alter the page settings for your receipt printer.

Normal Settings

```
Test Print

1234567890

12345678901234567890

123456789012345678901234567890
```

| Set Default Printer and Print Test Page | Page Settings |

Advanced Settings

| Use default print strategy (Mozilla Print) | Use alternate print strategy (DOS LPT1 Print) |

Warning: The alternate (DOS LPT1) print strategy will ignore the printer settings made in the "Normal Settings" section. In Windows, you must map your printer to the LPT1 port, under Start Menu -> Printers and Faxes -> your printer -> right-click, Properties -> Ports. Also, HTML styling such as different font weights and sizes will be lost when using the DOS LPT1 print. Data is sent to the printer as simple text in this case.

3. Click on *Page Settings* to change printing format and option settings. Click on the *Margins & Header/Footer* tab to adjust
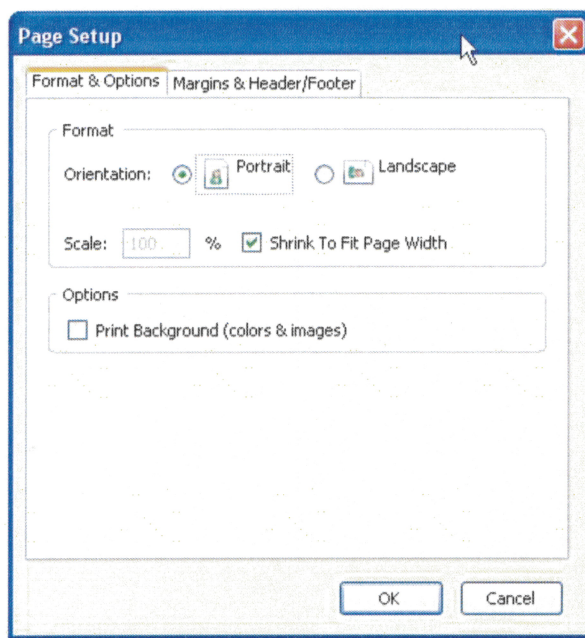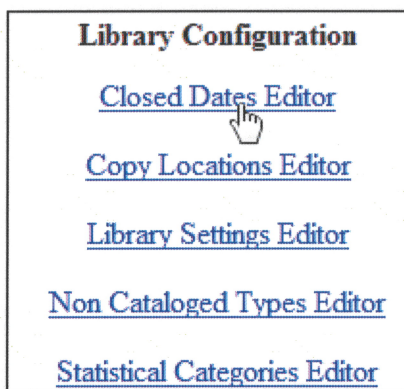

TIP
The Printing Settings Editor is primarily for making adjustments for your receipt printers. If you are having problems with formatting spine labels, see the Georgia PINES Spine Label Tip Sheet for Dot Matrix Printers.

Closed Dates Editor

1. Select *Closed Dates Editor* under *Library Configuration*.

2. Select *Add Multi-Date Closing* if your closed dates are entire business days.

Closed Dates Editor

Edit Closed Dates for: Terrace ▼

Closed Duration	Reason for Closing	Delete
All Day **2008-05-13**	Training	delete
From **2008-06-12** at **09:00:00** through **2008-06-12** at **13:00:00**	conversion recovery	delete
All Day **2008-07-01**	Canada Day	delete
Every Day From **2008-07-25** through **2008-07-28**	Pemberton Music Festival	delete

Note: All dates must have the form **YYYY-MM-DD** . Times must have the form **HH:MM**

| Add Single Day Closing | Add Mult-Date Closing | Add Detailed Closing |

3. Enter applicable dates and a descriptive reason for the closing and click *Save*. Check the *Apply to all of my libraries* box if your library is a multi-branch system and the closing applies to all of your branches.

Note: All dates must have the form **YYYY-MM-DD** . Times must have the form **HH:MM**

| Add Single Day Closing | Add Mult-Date Closing | Add Detailed Closing |

All Day From 2008-12-21 ▦ Through 2009-01-04 ▦

Reason for closing:

Winter holidays

Apply to all of my libraries ☐

Save   Cancel

TIP

These dates are in addition to your regular library closed days that the migration team hard coded into the system. If your regular closed days change, please contact support. Both regular closed days, and closed dates that are entered in the Local System Admin panel affect due dates and fines.

You can type dates into fields using YYYY-MM-DD format or use calendar widgets to choose dates.

If your closed dates include a portion of a business day, select *Add Detailed Closing* at Step 3 and include hours as described below.
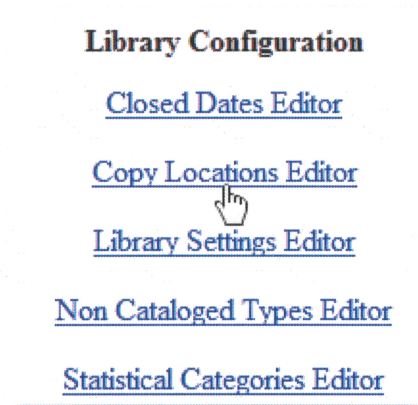
4. Enter detailed hours and dates and click *Save.* Time format must be HH:MM.

Note: All dates must have the form **YYYY-MM-DD** . Times must have the form **HH:MM**

Add Single Day Closing	Add Multi-Date Closing	Add Detailed Closing

Start Date	Start Time		End Date	End Time	
2008-12-21	13:00	All Day ☐	2009-01-04		All Day ☑

Reason for closing:

Winter holidays

Apply to all of my libraries ☐

Save	Cancel

Copy locations editor

1. Select *Copy Locations Editor* under *Library Configuration*.

Library Configuration

Closed Dates Editor

Copy Locations Editor

Library Settings Editor

Non Cataloged Types Editor

Statistical Categories Editor

2. You can create new copy locations, or edit existing copy locations. To create a new shelving location type in the name, and select Yes or No for the various attributes. A copy location can be OPAC Visible-yes or no, Holdable-yes or no, or Circulate-yes or no. Holdable means a patron is able to place a hold on an item in this location. Finally click *Create*.

Copy Locations Editor

	Create a new copy location		
Name:	Art books	Holdable:	Yes ⦿ No ○
OPAC Visible:	Yes ⦿ No ○	Circulate:	Yes ⦿ No ○
Owning Library:	Terrace ⌄		Create

NOTE

There are also options in the Copy Editor for a copy to be OPAC Visible-yes or no, Holdable-yes or no, or Circulate-yes or no. If either the copy record or the shelving location is set to Circulate-no, then the item will not be able to circulate.

3. In the bottom part of the Copy Locations Editor you can edit or delete existing copy locations. You cannot delete a location that contains items. In this example the copy location *Kids books* is being edited.

This is where you see the shelving locations in the Copy Editor:

This is where the shelving location appears in the OPAC.

Library settings editor

1. Select *Library Settings Editor* under *Library Configuration*.

Library Configuration

Closed Dates Editor

Copy Locations Editor

Library Settings Editor

Non Cataloged Types Editor

Statistical Categories Editor

MARC Uploader
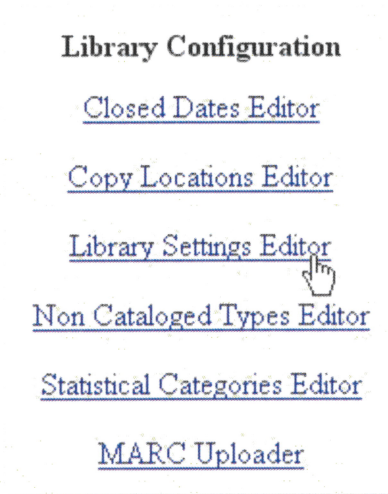
2. This is where you can enter your lost materials processing fee, default price for items, OPAC and staff inactivity timeout.

Library Settings Editor

Edit Settings for : Terrace

Library Settings for **Terrace**			
OPAC Inactivity Timeout (in seconds)	600	Apply	Apply to all Locations
Staff Login Inactivity Timeout (in seconds)	12000	Apply	Apply to all Locations
Lost Materials Processing Fee	$10.00	Apply	Apply to all Locations
Default Item Price	$15.00	Apply	Apply to all Locations
"FROM" email address for patron notices (note: delivery failures will be returned this address)	info@trainingterrace.ca	Apply	Apply to all Locations

I. "Apply to all Locations" will force the new setting to be applied to all locations in the location dropdown.

3. Many libraries have the OPAC Inactivity Timeout set to 600 seconds (10 min) and the Staff Login Inactivity Timeout set between 10,000 and 15,000 seconds (~2.5-4.5 hours). If these values are left blank the OPAC or the staff client will time out at the default settings. The default setting for the OPAC timeout is 420 seconds (7 minutes). The default setting for the staff client timeout is 7200 seconds (2 hours).

4. The Lost Materials Processing Fee is a default amount that is charged on top of the cost of the item if it is lost.

5. The Default Item Price is a default amount that is charged if the price is left blank when the item is catalogued (see Edit Item Attributes).

6. The "FROM" email address is for automatically generated patron notices (i.e. email overdues, email holds notification). It is good practice to set up a generic account, like info@nameofyourlibrary.ca so that one person's individual email inbox doesn't get cluttered with emails that were not sent.

Non Cataloged Types Editor

1. Select *Non Cataloged Types Editor* under *Library Configuration*.

Library Configuration

Closed Dates Editor

Copy Locations Editor

Library Settings Editor

Non Cataloged Types Editor

Statistical Categories Editor

MARC Uploader

This is where you configure your non-catalogued types that appear in the dropdown menu for non-catalogued circulations. See page 20 of the Circulation training handout for more information on this type of circulation.

2. To set up a new non-catalogued type, type the name in the left hand box, and choose how many days the item will circulate for. Click *Create*.

Non Cataloged Types Editor

Welc

		Create a new non-cataloged type			
	14	Days ▼	Circulate In-House? (??) ☐	Sitka Consortium ▼	Create

Name	Owning Location	Duration		Circulate In House	Edit	Delete
Comic books	Sitka Consortium	14	Days		Edit	Delete
Donated Magazines	Sitka Consortium	14	Days		Edit	Delete
Magazines	Terrace	14	Days		Edit	Delete
Paperback Book	Sitka Consortium	14	Days		Edit	Delete

NOTE

Select the *Circulate In-House* box for non-catalogued items that will circulate in house. This can be used to manually track computer use, or meeting room rentals.

This is what the dropdown menu for non-catalogued circulations in the patron checkout screen looks like:

Statistical Category Editor

1. Select *Statistical Category Editor* under *Library Configuration*.

This is where you configure your statistical categories (stat cats). Stat cats are a way to save and report on additional information that doesn't fit elsewhere. It is possible to have a stat cat for copies or patrons. Here are some examples of copy stat cats. You would see these when cataloging items in the *Edit Item Attributes* screen. You might use copy stat cats to track books you have bought from a specific vendor, or donations.

2. To create a new stat cat, enter the name of the stat cat, select if you want *Opac Visiblity*, and select either patron or copy from the *Type* dropdown menu.

This is what the copy stat cat looks like in the *Copy Editor*.

3. Here are some examples of patron stat cats. Patron stat cats can be used to keep track of information like the high school a patron attends, or the home library for a consortium patron, e.g. Interlink. You would see these in the fifth screen of patron registration/edit patron.

This is what the patron stat cat looks like in the patron registration screen. It looks very similar in the patron edit screen.

Surveys

This tip sheet will illustrate how to create a survey, show where the survey responses are saved in the patron record, and explain how to report on surveys.

Survey questions show up on the 6th patron registration screen, or on the 6th patron edit screen. Survey questions can be optional or required. Some examples of survey questions might include: Would you use the library if it were open on a Sunday?, Would you like to be contacted by the library to learn about new services?, Do you attend library programs?

Surveys come up when a patron is first registered. If you would like staff to ask the survey questions when the patron's library card is renewed, you'll need to make that part of local procedure.

It is possible to run reports on survey questions. For example, you could find out how many people say they would use the library if it were open on a Sunday, or you could get a list of patrons who say they would like to receive marketing material from the library.

Currently it is not possible to edit or delete a survey that you have created, please contact support if you need this done.

1. Under the top right hand *Admin (-)* menu, select *Survey Wizard.*
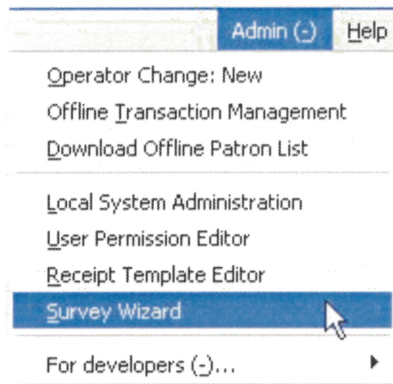
2. Give the survey a name and a description. Select if the survey will be required. Currently surveys are only visible in the staff client, so disregard the poll format, OPAC visible and Staff client options.

NOTE: If you are scheduling a survey for a specific time, ensure to enter the date in the YYYY-MM-DD format.

3. Fill in the survey question and click *Save this Question*.

4. Fill in each response to the survey question, clicking on *Save this Response* after each response. Later the responses will appear in the dropdown menu in the order that they are entered.

5. Click *Finish*.

This is what the survey looks like in the patron registration/edit screen. Note that in this example this survey question appears in red and is required as the *Required* box was checked in Step 2.

To see a patron's response to a survey, retrieve the patron record. Click on *Info* button, and then on *Surveys* tab to see the response.

Reporting on surveys

There is a template for reporting on patron surveys in the reporting interface, under SITKA_templates > Patrons > Patron Surveys. If you need help tweaking this template please contact support.